



Using Mail Chimp with IQX

Set up

General settings> Email /Telephony – 300 + 301 need to be populated with your mailchimp API key and URL.

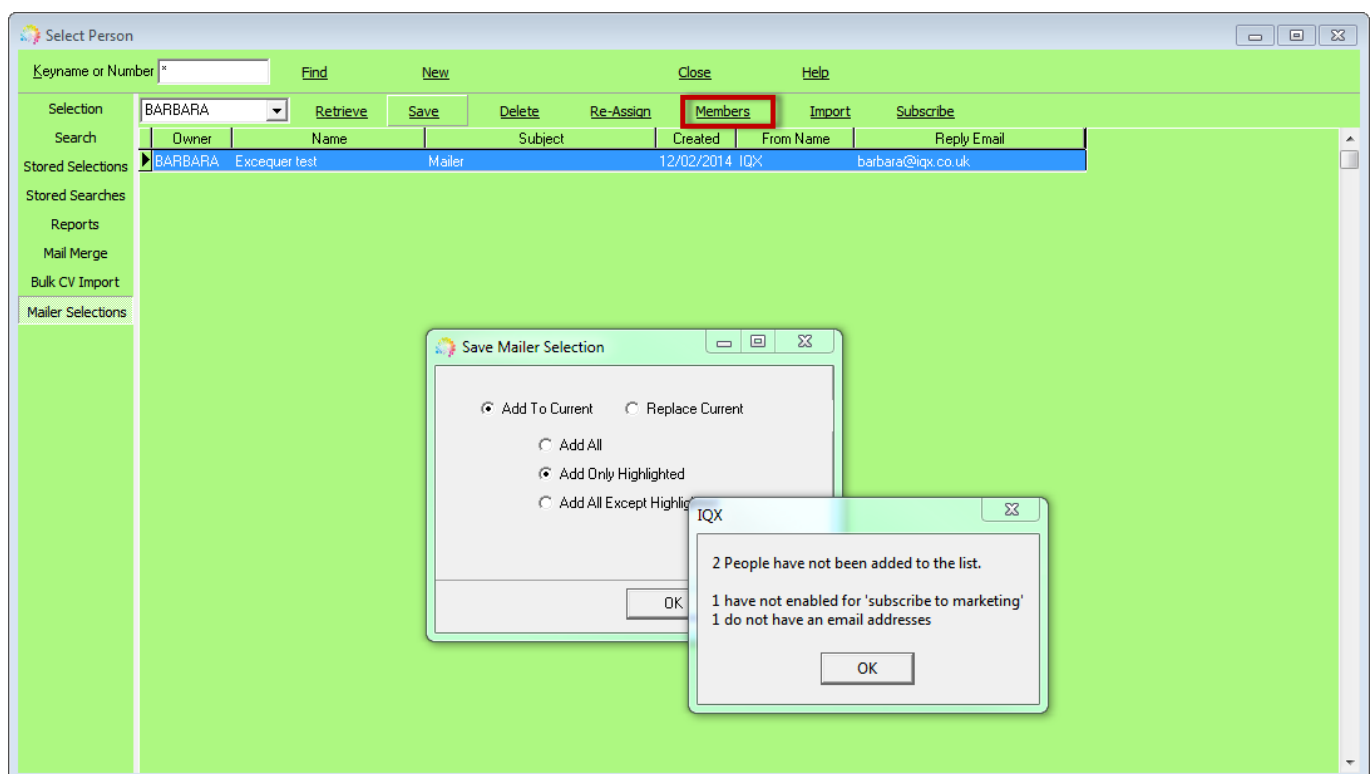
Agency Set up> Contact Event Types – create new type with ID of 'SB'. Called something like 'MailChimp Subscription'.

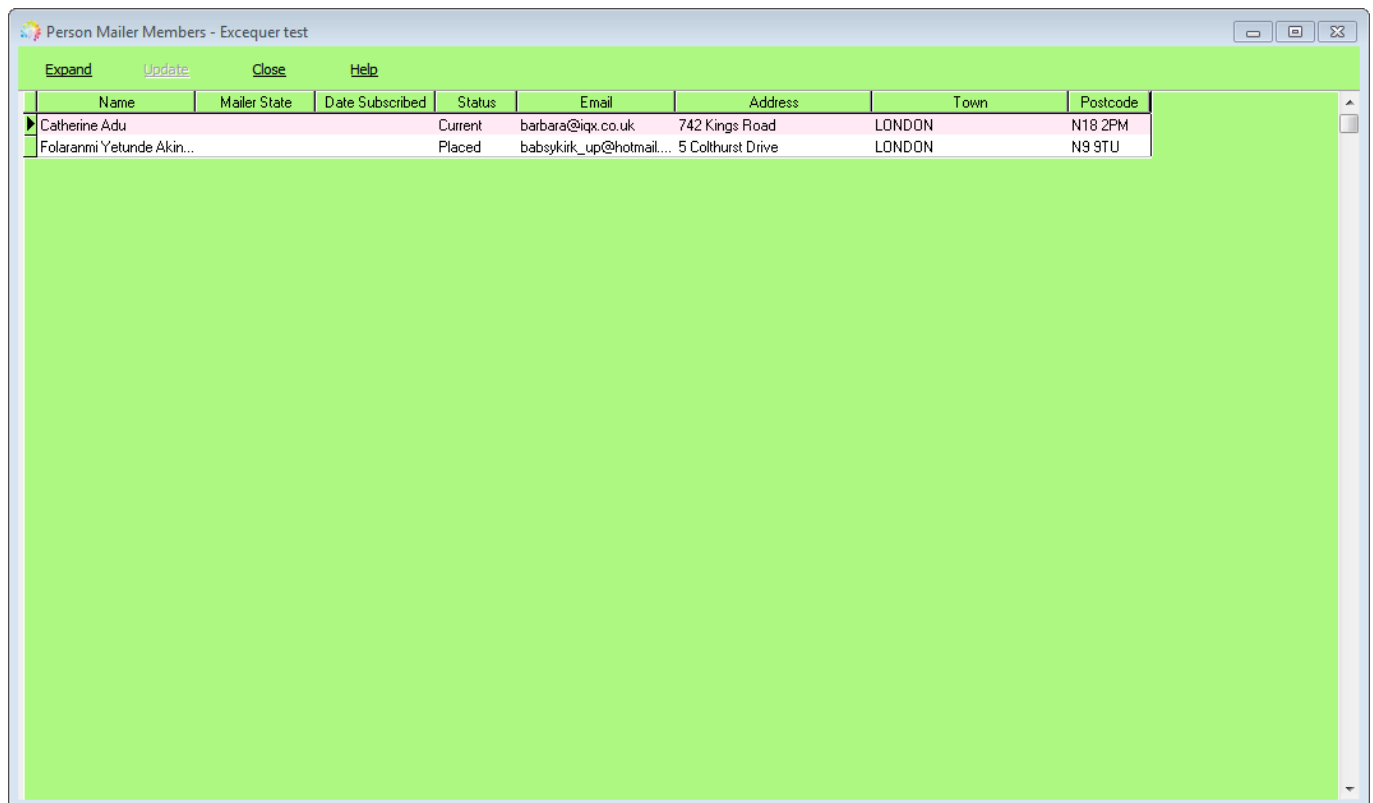
Once set up is complete you will then see a new view on Person & Client contact selector forms – Mailer Selections.

Create your list name in Mailchimp. Then click on the IMPORT button on the Mailer Selections view. This will create the list within IQX.

Adding people to the list is similar to creating stored selection. Search & highlight the relevant people. Save.

Clicking on the Members button will show you the list of people added and their Mailer State.





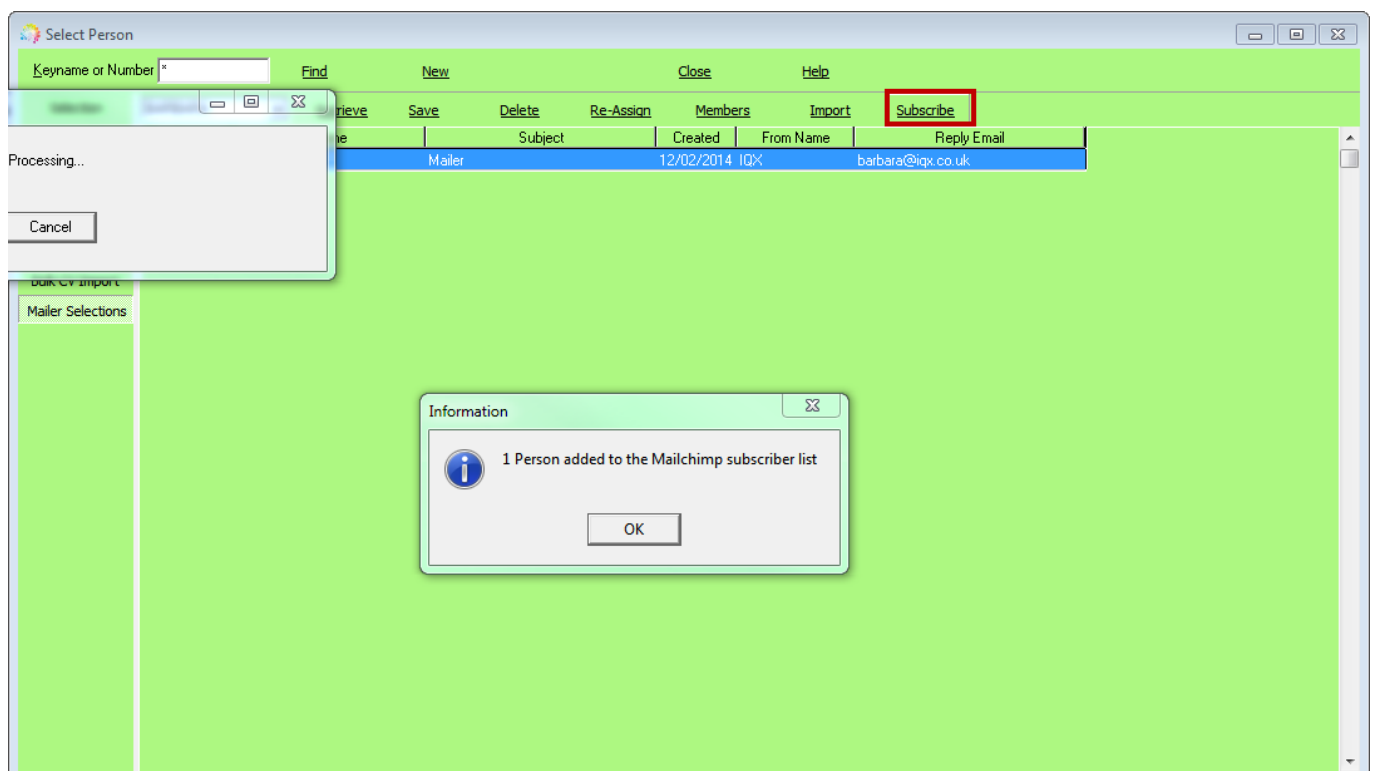
Person Mailer Members - Excequer test

Expand Update Close Help

Name	Mailer State	Date Subscribed	Status	Email	Address	Town	Postcode
Catherine Adu			Current	barbara@iqx.co.uk	742 Kings Road	LONDON	N18 2PM
Folaranmi Yetunde Akin...			Placed	babsykirik_up@hotmail...	5 Colthurst Drive	LONDON	N9 9TU

The lists can be saved into other consultants names (either on creation or using the Reassign button). And added to/replaced as with Stored Selections.

Using the Subscribe button will send the Subscription Request email from Mailchimp and save a contact event into the relevant record.



Select Person

Keyname or Number Find New Close Help

Retrieve Save Delete Re-Assign Members Import **Subscribe**

Subject	Created	From Name	Reply Email
Mailer	12/02/2014 IQX		barbara@iqx.co.uk

Processing...

Cancel

Mailchimp Import

Mailer Selections

Information

1 Person added to the Mailchimp subscriber list

OK



Contact Event Folaranmi Yetunde Akinyemi

Text

Letter Text

Person	Folaranmi Yetunde Akinyemi	☐ Folaranmi Yetu...
Made By	BARBARA	Home Phone 0208 344 5983
Date	12/02/2014	Mobile 07970 637177
Time	11:16	E-mail babsykirk_up@hotmail.com
Type	Mailer Subscription request sent	LinkedIn http://uk.linkedin.com/pub/ba
Summary	Mailchimp Subscriber	
Outcome		
Callback		
Callback Time		
Priority	5	
Created By	BARBARA	
Created	12/02/2014 11:16	

[Insert Text](#) [Spell Check](#) [Duplicate](#) [Available To All](#)

[Send Text](#) [Write Letter](#) [Send E-mail](#) [Reply](#)

Added to subscriber list Excequer test



Excequer test

Please Confirm Subscription

Yes, subscribe me to this list.

If you received this email by mistake, simply delete it. You won't be subscribed if you don't click the confirmation link above.

For questions about this list, please contact:
barbara@iqx.co.uk

MailChimp

Once they confirm subscription they appear on your list in mailchimp to use for your mailchimp mailers.

Job available to run to unsubscribe people that will send an unsubscribe request to Mailchimp for any with the unsubscribe button pressed on their record.

From:

<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:

<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug10-10&rev=1401273301>

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